



## GSA Federal Acquisition Training Symposium

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# Successful Requirements Development

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# Why is Requirements Planning Important?

A well-written requirements document offers benefits such as:

## ➤ Pre-award:

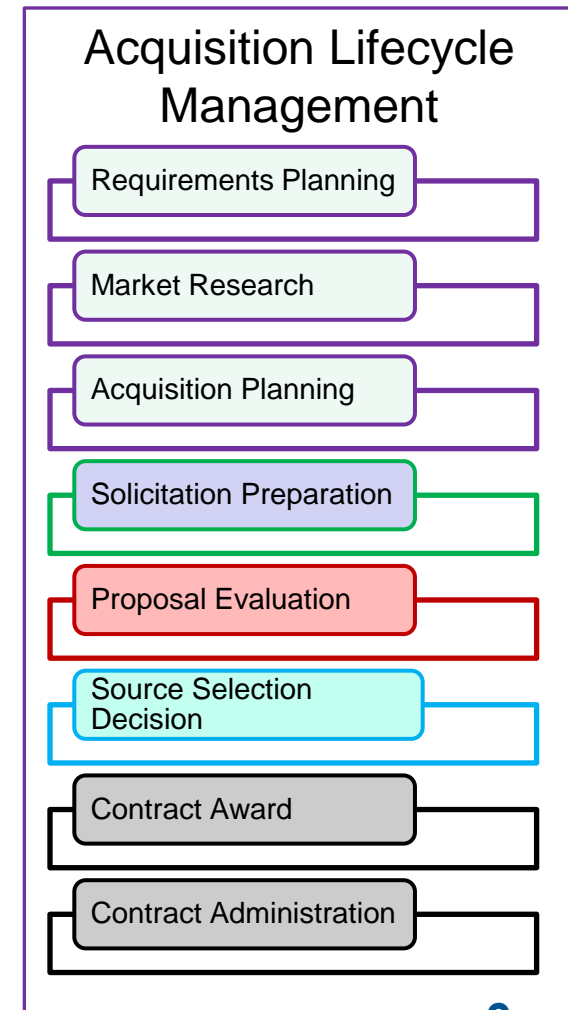
- Reduce number of questions from industry
- Establish meaningful evaluation criteria that allows for differentiation
- Improve customer satisfaction

## ➤ Post-award:

- Minimized operational risks  
(i.e., project failure, delays, weak contract management and less time, energy and issues in contract administration)
- Minimized financial risks  
(i.e., cost growth, contract modifications, requirements creep)
- Minimized legal risks  
(i.e., contractor litigation, dispute resolution)

# Major Principles of Federal Acquisition

- Competition (vs. sole or limited source)
- Transparency (in all acquisition phases)
- Best value decisions
- Fair and reasonable price
- Ethical conduct
- Social/industrial base goals
  - SBs, SDBs, SDVOSBs, WOSBs
  - Multiple sources to maintain industrial base
- Government & Industry Collaboration



# Successful Requirements Development

## Step 1: Define the Requirements/Need

- Define work the Contractor will perform
- Use the existing SOW/PWS, when available, ***as a baseline***
- Review the current strategy to capture your ***current condition*** and identify what improvements are needed through the use of a SWOT analysis
- (SWOT = Strengths, Weaknesses, Opportunities, Threats)
- Interview your stakeholders to capture their concerns, priorities, and projected requirements (e.g., What went right? What issues did we have?)

# Successful Requirements Development

## Step 2: Define the Right Type of Work Statement Method

### SOO

#### Statement of Objectives:

Formal document used in solicitations when the Government intends to provide the ***maximum flexibility*** to each offeror to propose an ***innovative approach***.

### PWS

#### Performance Work Statement:

Formal document that describes ***concisely*** what is required as an ***end result*** and how the Government will monitor and evaluate the contractor's performance.

### SOW

#### Statement of Work:

Formal document that captures and ***defines the work activities***, deliverables, and timeline a contractor must execute in performance of specified work (non-performance based).

# SOO/SOW/PWS – What are the differences?

## Statement of Objectives (SOO):

“The Contractor shall provide a sweet treat which must include chocolate at all dining facilities on Valentine’s Day.”

Task: Acting as the Contractor, what sweet treat do you propose to provide?



# Statement of Work (SOW)

## 1 Dozen Chocolate Chip Cookies



### Ingredients:

- 1 cup Butter or Margarine (2 Sticks), softened
- 2¼ cup all-purpose flour
- 1 teaspoon of salt
- ¼ cup of baking soda
- 1 cup dark brown sugar
- ½ cup granulated sugar
- 2 large eggs, beaten
- 2 teaspoons (tsp) real bourbon vanilla
- 12 ounces semi-sweet chocolate chips
- 1 cup shelled walnuts

## SOW: 1 Dozen Chocolate Chip Cookies cont'd



### Directions:

-Preheat oven to 325°Fahrenheit

-Use an electric mixer to mix sugars & butter in a large bowl. Add the other wet ingredients, mixing well. Mix in flour, baking soda, and salt. Finally mix in chocolate chips and nuts.

-Place tablespoon-sized balls of cookie dough on an ungreased baking sheet and bake for 11 minutes. Carefully lift the cookies with a spatula and place them on a rack to cool.

-Packaging should provide adequate moisture protection so that the cookies remain fresh and no more than five percent of the delivered cookies experience breakage.

-Delivery must be made not later than 7 days after contract award. Acceptance will be made by the COR after tasting a random sample.



# Performance Work Statement (PWS)

## 1 Dozen Chocolate Chip Cookies



### 3 Key Questions

#### **What is needed?**

1 dozen perfectly baked chocolate chip cookies

#### **When is it needed?**

One week from today

#### **What expectations are there when the service is received?**


Must taste good and not be broken

## PWS: 1 Dozen Chocolate Chip Cookies



The Contractor shall deliver, one week from today, one dozen perfectly baked chocolate chip cookies that taste good and are not broken.

## PWS: 1 Dozen Chocolate Chip Cookies



Look at it  
More Closely

Are there any  
potential  
problem areas  
or concerns with  
this statement?

## PWS: 1 Dozen Chocolate Chip Cookies



The Contractor shall deliver, one week from today, one dozen perfectly baked chocolate chip cookies that taste good and are not broken.



## PWS: 1 Dozen Chocolate Chip Cookies



The Contractor shall deliver, by 1300 13 February 2018, one dozen baked chocolate chip cookies that are approximately 2" in diameter, moist, chewy and not broken.



# Successful Requirements Development

## Step 3: Establish Evaluation Criteria

### ➤ Section M, Evaluation Factors for Award

- Defines how proposals will be evaluated and how the successful Offeror(s) will be selected
  - Identifies the factors/sub-factors to be evaluated
  - Sets forth the relationship of the factors/sub-factors to each other and to cost/price

### ➤ Section L, Instructions to Offerors

- Provides instructions on how to structure the proposal
  - Informs Offerors of the proposal submission requirements needed in order to evaluate the factors/sub-factors in Section M
  - Specifies volumes requested, formats, number of copies, page limitations, and specific instructions on information to be included in each volume

## Section M - Evaluation Factors/Sub-factors

This is a competitive acquisition for the single award of a firm-fixed price contract. Award will be made to the best overall proposal that is determined to be the most beneficial to the Government with appropriate consideration given to the three (3) evaluation factors: Technical, Price and Past Performance. The Technical factor is significantly more important than the Price factor. The Price factor is more important than the Past Performance factor. All non-price factors combined are significantly more important than price.



## Section M - Evaluation Factors/Sub-factors

- Technical Factor: The Technical factor is further divided into the following subfactors:
  - Sub-factor 1: Taste
  - Sub-factor 2: Appearance - will be evaluated for uniformity and overall visual appeal.

Sub-factor 1 is more important than Sub-factor 2.

- Price Factor
- Past Performance Factor



## Section L – Instructions to Offerors

- **Technical Factor:** This volume shall be organized into the following sections:
  - Sub-factor 1: Taste. The Offeror's proposal shall provide a list and amounts of ingredients.
  - Sub-factor 2: Appearance. The Offeror shall provide 6 cookies to be used for the evaluation.
- **Price Factor:** This volume shall consist of the firm-fixed price for each CLIN as specified in Section B of the RFP.
- **Past Performance Factor:** This volume shall contain past performance information regarding similar contracts. This volume shall not exceed 10 pages, excluding Past Performance Questionnaire Forms. Offerors shall submit three Government and/or commercial contracts for the prime offeror in performance or awarded during the past three years, from the issue date of this RFP, which are relevant to the efforts required by this solicitation.

## Conclusion

- Requirements definition will be different for a sole source contract vs. a competitive contract
- When defining requirements for a competitive action, you must:
  - Ensure the requirement is clearly defined
    - Ambiguous language hurts the Government
  - Ensure the evaluation criteria is limited to the factors/sub-factors that will differentiate among the Offerors
  - Ensure the evaluation criteria (Section M) clearly identifies the relative importance (weight) of the factors/sub-factors
  - Ensure the instructions to Offerors (Section L) track to the evaluation criteria and that only the information necessary to conduct the evaluation is requested



## Contact Information



This session has only provided the tip of the iceberg in relation to the Acquisition Process!

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